

WeSendMoney

Facility User's Manual

9/12/2015

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Getting Started

WeSendMoney provides easy, fast and secure money transfer services for family and friends of inmates. WeSendMoney is an excellent way to send money to inmates in prison and correctional facilities.

To use our services, you must first register online.

Registering

Before your Facility can receive money for an inmate/offender you must first register with WeSendMoney.

To register

1. On the WeSendMoney home page, select **For Facility Login / Registration** [Click here](#) (Figure 1).

Figure 1. WeSendMoney Home Page

2. On the Facility Login / Registration page, select **For Facility Registration** [Click here](#) (Figure 2).

Figure 2. Facility Login / Registration

3. On the Registration page, enter your information (Figure 3).

Figure 3. Facility Registration Information

4. Click **Register**.

Note: Remember the **Username** and **Password** as you will use this information to login to the website.

Note: The password you enter during registration must be at least 6 characters long, must contain a letter and a number.

Note: The phone number MUST be in the format **(xxx)xxx-xxxx**, no spaces.

About My Account

Your account holds your personal information. You cannot use the WeSendMoney services without registering. The information you provide allows processing of your payments. You can modify this information at any time.

My Account

The **My Account** page will allow you to view registration information, change the password and update information for your WeSendMoney Account.

Figure 4. WeSendMoney Account: My Account Page

To view Information

On the **WeSendMoney** page, click **My Account** (at the upper right) and the account information will be displayed (Figure 4).

To update Information

On the **My Account** page, you can change any information you entered

1. Type the new information into the boxes.
2. Click on **Update** (Figure 4).

To change Password

On the **My Account** page, click **Change Password** (Figure 5).

Figure 5. WeSendMoney Account: My Account Page – Change Password

1. On the resulting screen (Figure 6), type **Old Password**.
2. Type **New Password**.
3. **Confirm Password** by typing in the new password.
4. Click **Update**.

Figure 6. WeSendMoney Account: Change Password

Logging in

After registering, to use the WeSendMoney website you can login by clicking on **For Facility Login / Registration** [Click here](#) on the WeSendMoney home page (Figure 1).

Enter your **Username** and **Password** and then click on **Login** button (Figure 7).

Figure 7. Facility Login

Forgot your password

1. On the **Login** page, click **Forgot Password** (Figure 7).
2. On the **Forgot Password** page, enter the email address you registered with and click **Submit** (Figure 8).

Figure 8. Forgot Password

3. Your password will be sent to the registered email address and you will be able to login immediately. Look in the Spam folder if the email is not in your Inbox.

Configure WePay Account

Once you have registered, you will need to configure your WePay Account to accept money into your WePay Account.

To configure WePay Account

1. After logging in, the **Configure WEPAY Account** page in Figure 9 will appear.

Figure 9. Configure WePay Account

2. Click **Activate Your WEPAY Account**.
3. The **WeSendMoney / WePay** login page will appear (Figure 10).

Figure 10. WeSendMoney / WePay Login Page

4. Enter the WeSendMoney login information and check the box beside **I agree to WePay's Terms of Service and Privacy Policy**.
5. Click **Grant Access**. This will authorize the account.

Note: You can read WePay's Terms of Services and Privacy Policy by clicking on the highlighted text.

To change WePay Account Id

1. Once account is activated (Figure 11), to change your **Account ID**, type the information into the input box for account ID and click **Update**

To change WePay Access Token

1. Once account is activated (Figure 11), to change your **Access Token**, type the information into the input box for access token and click **Update**

WeSendMoney

TRANSACTIONSWEPAY CONFIGURATIONMY ACCOUNTLOGOUT

Configure WEPAY Account

Your WEPAY account has been authorized.

Account ID

0000000000

Access Token

STAGE_000000000000000000
000000000000000000000000
00000000000000

Update

Figure 11. WePay Account Has Been Authorized

Note: Your account ID and Access Token will differ from those shown.

My Payments – WePay Account

To the right of **Your Name** at the top of the screen is a small triangle (Figure 14). Click this to access **My Payments** from the drop down menu. The **My Payments** listing will display **All**, **Completed** and **Pending** payments and allow you to search for payments (Figure 12).

we

pay

Your Name

!

Help

Home

My Payments

AllCompletedPending

Search

Export CSV

You have not made any transactions yet.

Figure 12. WePay Account – My Payments

All

On the **My Payments** page, click **All**. This will list all payments.

Completed

On the **My Payments** page, click **Completed**. This will list completed payments

Pending

On the **My Payments** page, click **Pending**. This will list pending payments

Search

On the **My Payments** page, type information to search for and press enter. The information will be displayed on the screen.

Export CSV

On the **My Payments** page, click **Export CSV** to export payment information in a comma separated values file format, which can be read by spreadsheet applications.

Note: Once the information is exported, the information is removed from the WePay Application.

Transactions

The **Transactions** page (Figure 13) will list all payments sent to your WePay Account. On this page, you can view transactions, print inmate receipts and withdraw funds from your WePay Account.

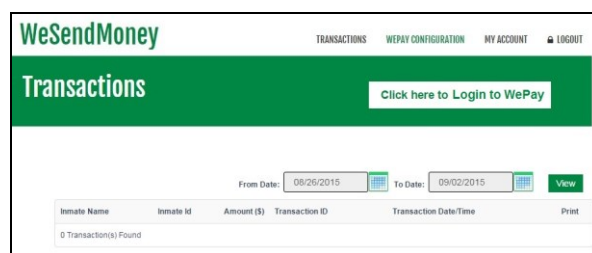


Figure 13. WePay Account – Transactions

To View Transactions

1. On the WePay Configuration page (Figure 11), click **Transactions** at the top of the page.
2. On the **Transactions** page (Figure 13), click on the calendar icon to select a **From Date** and then a **To Date**.
3. Click on **View**. This will list all transaction for the dates given.

To Print Inmate Receipt

1. To print the Inmate Receipt, click the **Print** Icon on the line of the Inmate, a pop-up screen for printing will appear for printing.

Note: Deselect the Header and Footer check box if the box is checked

To Print Transaction Listing

1. To print a list of all transactions use your browser to print the listing (select file, print from the web browser Internet Explorer).

WePay Account

The WePay Account is used to accept inmate payments and to withdraw inmate funds that are sent to the inmates. It is also for verifying and entering **Basic Account Information**, **Bank Account Information**, allows you to choose **Payment by Check**, create **Withdrawal Schedules**, view **Transactions** and view **Account Balance**.

Login - WePay Account

1. On the bar, click on [Click here to Login to WePay](#) (Figure 13).
2. Enter email address and password to Login to WePay.
3. Select desired options.

Accept Inmate Payments

To **Accept Payments (Receive Money)** for the Inmate you must enter information in the Trust Center. The information needed is Basic Information to verify who you are and to enter a Bank Account to accept and withdraw money payments for the Inmates.

To Accept Payments (Receive Money)

Enter information (identifying information):

1. Login to Wepay (if you are not already logged in).
2. On **Accounts** page, on bar select **Settings** (gear icon button).
3. Click **Trust Center**
4. Click **GO - Basic Account Verification**.
5. Select **Organization**
6. Select **Accountant** for **How will you use WePay**
7. Enter information (Your information should match Name given on Bank Account).
8. **Add your Bank Account** screen will appear; enter required information and **Save**.

To Withdraw Funds

Set Withdrawal bank account information:

1. Login to Wepay (if you are not already logged in).
2. On bar, click on **Settings** (gear icon button)
3. Click on **Withdrawals**
4. Click on **Link your Bank Account** - to link a bank account to accept withdrawals
5. Enter your new withdrawal information and **Save**.

My Profile – WePay Account

To the right of **Your Name** at the top of the screen is a small triangle (Figure 14).

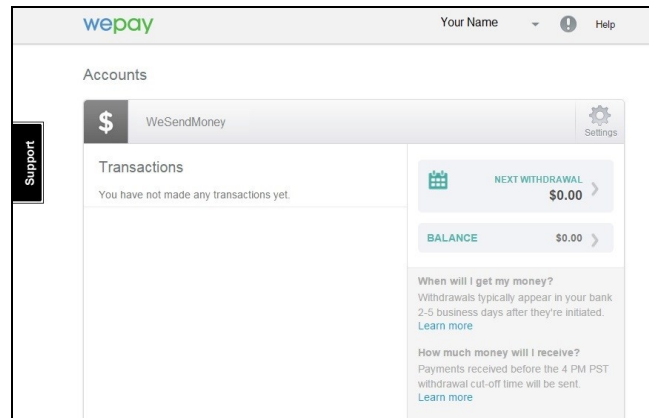


Figure 14. WePay Account – Accounts Page

Click this to access **My Profile** from the drop down menu. This page will allow you to create and change **Email Address, Password, 2-Step Verification, Contact Information, Notifications, Credit Cards, Bank Accounts, Recurring Payments, Applications** and **Delete** for your WePay Account (Figure 15).

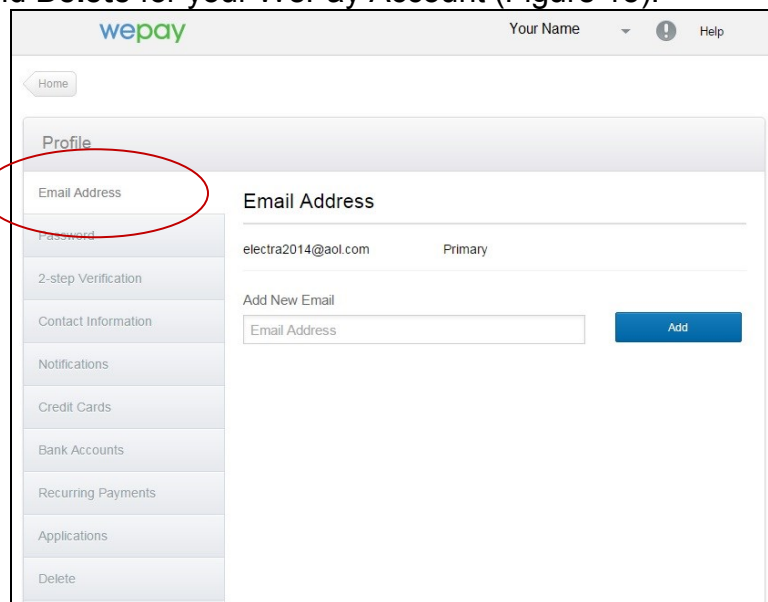


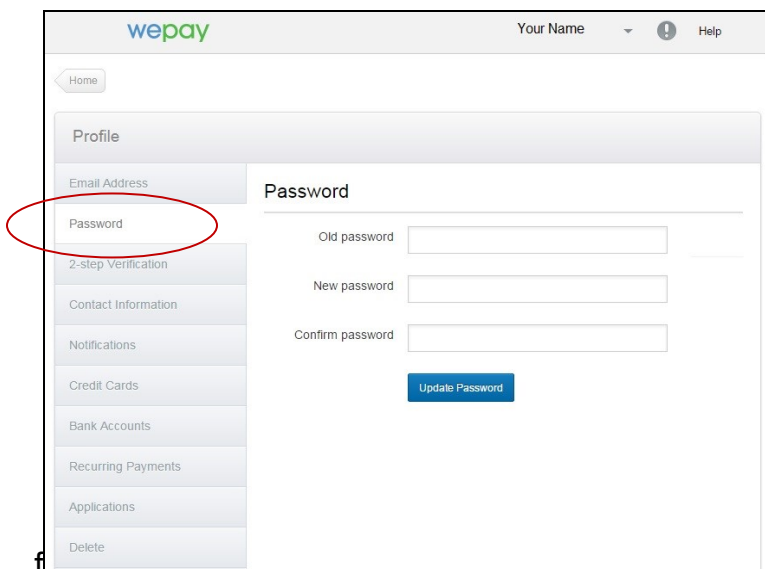
Figure 15. WePay Account: My Profile—Email

Email address

1. On the **My Profile** page, click **Email Address** (Figure 15).
2. Type new Email Address
3. Click **Add** button.

Password

1. On the **My Profile** page, click **Password** (Figure 16).
2. Type **Old Password**.
3. Type **New Password**.
4. Type the new password into the field **Confirm password**.
5. Click **Update Password** button.

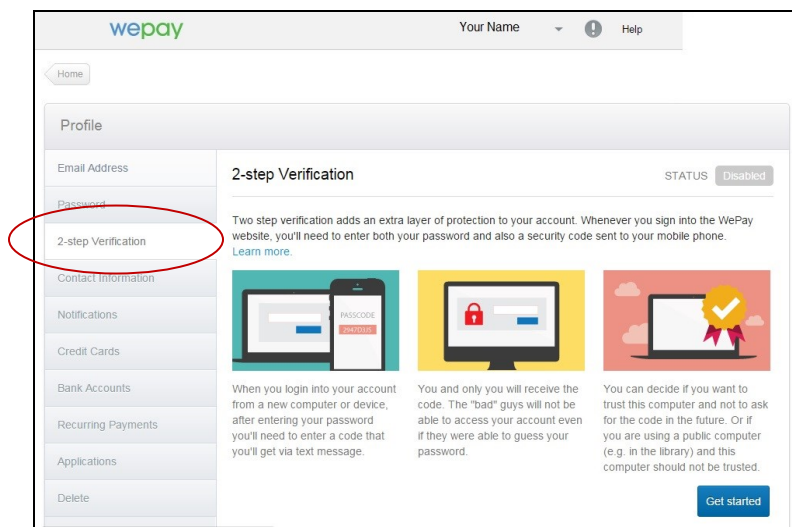


The screenshot shows the WePay account profile page. On the left is a sidebar with a 'Profile' header and a list of menu items: Email Address, Password, 2-step Verification, Contact Information, Notifications, Credit Cards, Bank Accounts, Recurring Payments, Applications, and Delete. The 'Password' item is circled in red. The main content area is titled 'Password' and contains three input fields: 'Old password', 'New password', and 'Confirm password'. Below these fields is a blue button labeled 'Update Password'.

Figure 16. WePay Account: My Profile—Password

2-Step Verification

1. On the **My Profile** page, click **2-Step Verification** (Figure 17).
2. Review the information on the screen and determine if you want/need the 2-step verification.
3. If you want this linked to your account, click **Get Started** and enter the required information.



The screenshot shows the WePay account profile page with the '2-step Verification' section selected in the sidebar (circled in red). The main content area is titled '2-step Verification' and includes a 'STATUS: Disabled' button. Below the title is a paragraph explaining two-step verification and a 'Learn more' link. There are three illustrative icons: a laptop and smartphone showing a passcode, a laptop with a lock icon, and a laptop with a checkmark icon. Below these icons are three columns of text explaining the process and benefits. At the bottom right is a blue 'Get started' button.

Figure 17. WePay Account: My Profile—2-Step Verification

Contact Information

1. On the **My Profile** page, click **Contact Information** (Figure 18).
2. Type in contact information.
3. Click **Add** button.

The screenshot shows the WePay 'My Profile' page. On the left sidebar, the 'Contact Information' link is circled in red. The main content area is titled 'Contact Information' and contains a message: 'A primary contact information has not been set.' Below this is a form with the following fields: 'Address' (text input), 'City' (text input), 'State' (dropdown menu currently showing '- Select -'), 'Zip' (text input), and 'Phone' (text input). A blue 'Add' button is located at the bottom right of the form. The sidebar also includes links for Email Address, Password, 2-step Verification, Credit Cards, Bank Accounts, Recurring Payments, Applications, and Delete.

Figure 18. WePay Account: My Profile—Contact Information

Notifications

1. On the **My Profile** page, click **Notifications** (Figure 19).
2. Click the box next to the type of notification you would like to receive.
3. Click **Save** button.

The screenshot shows the WePay 'My Profile' page with the 'Notifications' section selected. The 'Notifications' link in the left sidebar is circled in red. The main content area is titled 'Notifications' and lists four notification types, each with a checked checkbox and a description:

- System Messages** (Required, cannot unsubscribe): These are very important messages that need to be delivered to you in order for your profile to function properly. These include things like password resets/reminders, email confirmation, and other security related messages. You cannot unsubscribe from these messages without deleting your profile.
- Account Messages**: These are important messages pertaining to your accounts and your profile. These include things like payment confirmations, reminders, issues needing attention, and other important issues about your accounts. We recommend you stay subscribed to this so you don't miss a payment.
- Activity Messages**: These messages relate to your account activity, such as account invites.
- Newsletters and Marketing**: On occasion, we'll send out announcements about things such as newly released features, helpful articles, special promotions, and other things we think will improve your experience.

 A blue 'Save' button is located at the bottom of the notification list. The sidebar also includes links for Email Address, Password, 2-step Verification, Contact Information, Credit Cards, Bank Accounts, Recurring Payments, Applications, and Delete.

Figure 19. WePay Account: My Profile—Notifications

Credit Cards

1. On the **My Profile** page, click **Credit Cards** (Figure 20).
2. If you haven't added any credit cards, the message **"You can add a new credit card when you make a payment"** will display.
3. If you have already made a payment, the credit cards on file will display.

Note: It is not necessary to use Credit Card, if you are only receiving money not paying

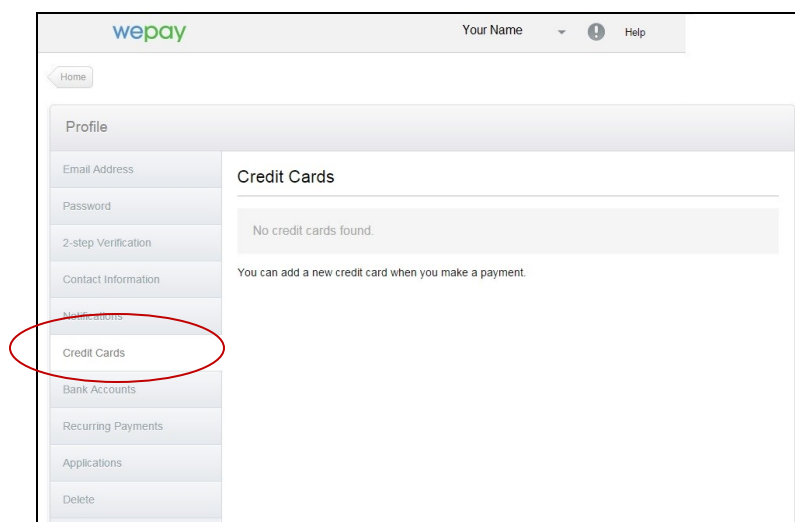


Figure 20. WePay Account: My Profile—Credit Cards

Bank Accounts

1. On the **My Profile** page, click **Bank Accounts** (Figure 21).
2. If you haven't added any bank accounts, the message "**You can add a new bank account when you make a payment**" will display.
3. If you have already made a payment, the bank account(s) on file will display.

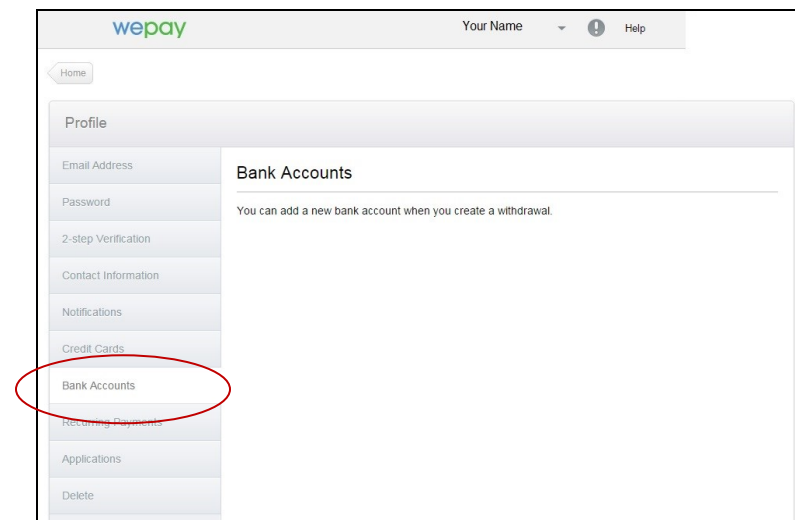


Figure 21. WePay Account: My Profile—Bank Accounts

Recurring Payments

1. On the **My Profile** page, click **Recurring Payments** (Figure 22).
2. If you haven't created a recurring payment, the message "**No recurring payments**" will display.
3. If you have already set up a recurring payment, it will be listed here.

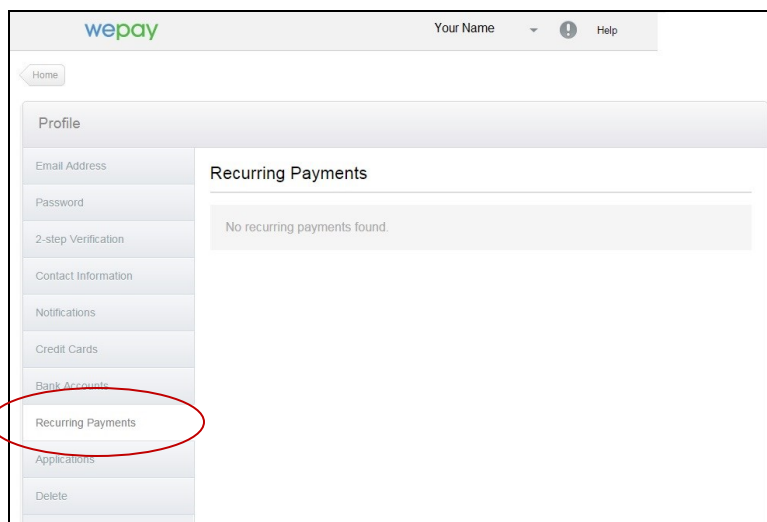


Figure 22. WePay Account: My Profile—Recurring Payments

Applications

1. On the **My Profile** page, click **Applications** (Figure 23).
2. Review the information for verification.
3. If this is the account you wish to disallow, click **Revoke Access** to revoke access to the WePay Application

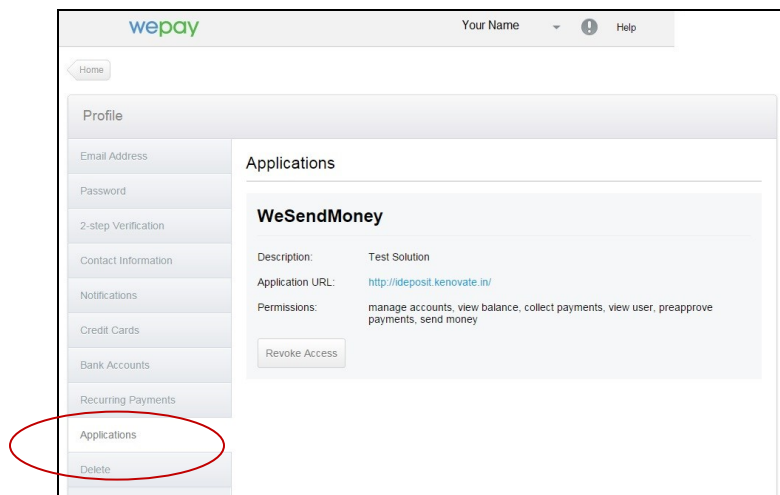


Figure 23. WePay Account: My Profile—Applications

Note: DO NOT Revoke Access to the WeSendMoney website. If you Revoke Access you will not be able to receive money payments for the inmates from WeSendMoney.

Delete

1. On the **My Profile** page, click **Delete** (Figure 24).
2. Review the information for verification.
3. Click **Delete** if this is the account you wish to delete.

Note: This action **cannot** be undone.

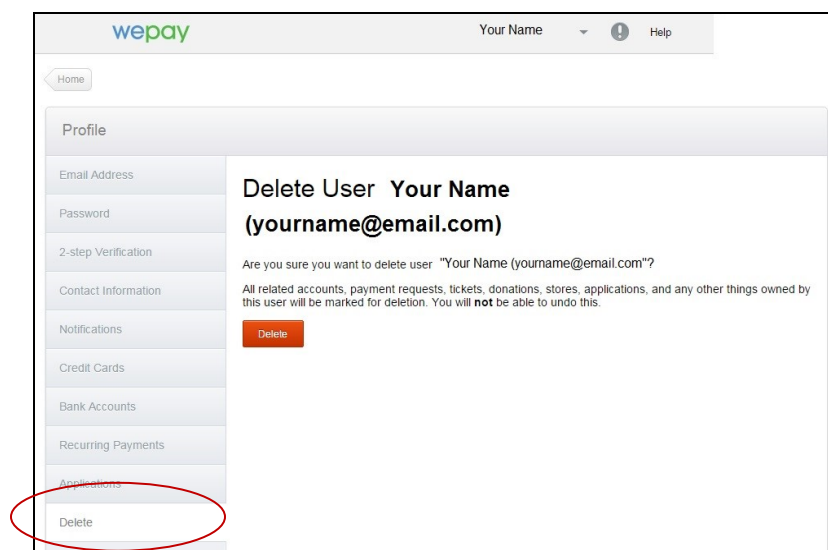


Figure 24. WePay Account: My Profile—Delete

Logout – WePay Account

1. To the right of **Your Name** at the top of the screen is a small triangle (Figure 14). Click this to view the drop down menu.
2. Click **Logout** to log out of your WePay Account.

Contacting customer service

If you have questions, you can send customer service an email.

1. On any WeSendMoney page, click **Contact Us** in the footer (Figure 25).

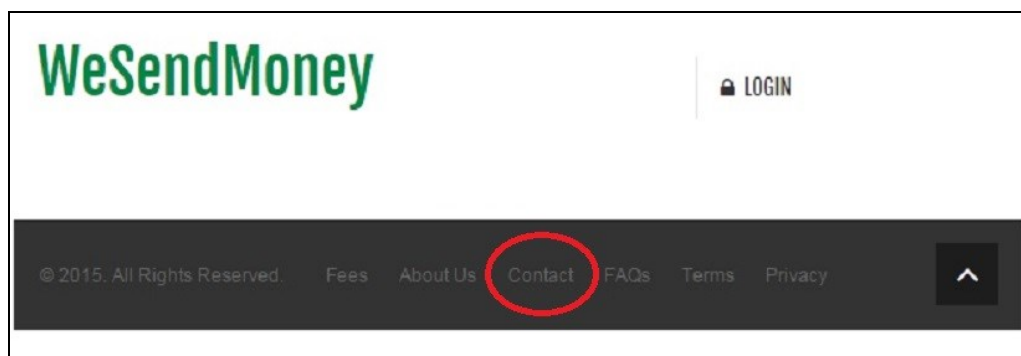


Figure 25. Contact Us - Footer

2. On the **Contact** page, click **customerservice@WeSendMoney.com** (Figure 26).

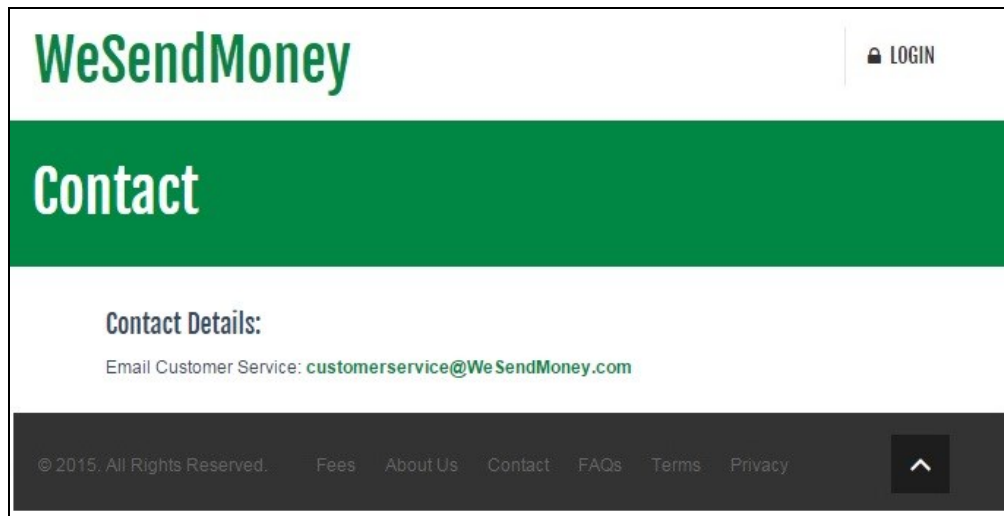


Figure 26. Contact Us